Appendix B: Sample Project Plan Outline and Role Responsibilities

LEGEND:	
Primary Responsibility for the Task =	●
Involved in the Task =	❍
Provides Input to the Task =	◆
Informed Task Results =	❒
Optional Involvement in the Task =	■

	Project Task	Business End Users	Business Sponsor	IS Sponsor	Business Driver	Business Project Lead	Project Manager	Business Sys. Analyst	Data Modeler	DW DBA	Data Staging Designer	DW Educator	E/U Appl'n Developer	Tech/Security Architect	Tech Support Specialist	Data Staging Programmer	Data Steward	DW QA Analyst
	PROJECT MANAGEMENT AND REQUIREMENTS																	
	PROJECT DEFINITION																	
1	Assess Data Warehousing Readiness		❍	❍	❍	●	●	◆	◆	◆	◆			◆				
2	Develop Preliminary Project Scope		❍	❍	❍	●	●	◆	◆	◆	◆			◆				
3	Build Business Justification	◆	◆	◆	●	●	❍	◆										
	PROJECT PLANNING & MANAGEMENT																	
1	Establish Project Identity				◆	●	●											
2	Identify Project Resources		❍	❍	❍	●	●											
3	Prepare Draft Project Plan				◆	◆	●	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
4	Conduct Project Team Kick-Off & Planning		❒	❒	❍	❍	●	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍
5	Revise Project Plan				◆	◆	●	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
6	Develop Project Communication Plan		◆	◆	◆	❍	●	◆	◆	◆	◆	■	◆	◆	■	◆	■	■
7	Develop Program to Measure Success		❍	❍	❍	●	❍											
8	Develop Process to Manage Scope				❍	❍	●											
9	Ongoing Project Management					❍	●											

	USER REQUIREMENT DEFINITION																	
1	Identify and Prepare Interview Team						●	❍	❍									
2	Select Interviewees		◆	◆	◆	●	●											
3	Schedule Interviews					❍	●											
4	Conduct User Kick-Off & Prepare Interviewees	❍	❍	❍	❍	❍	●	❍	❍									
5	Conduct Business User Interviews	❍	❍		❍	❍	■	●	■				■					
6	Conduct IS Data Discovery Interviews						■	●	●	❍	❍		■			❍		
7	Analyze Interview Findings					❍	❍	●										
8	Document Findings and Review	◆			◆	❍	❍	●	❍				■					
9	Publish Requirements Deliverables	❒	❒	❒	❒	❍	❍	●	❍	❒	❒	❒	❒	❒	❒	❒	❒	❒
10	Prioritize and Revise Project Scope	◆	◆	◆	❍	●	●	◆	◆				◆					
11	User Acceptance/Project Review	■	❒	❒	❍	●	❍	❍	❍	❍	❍	■	❍	■	■	❍	■	■
	DATA DESIGN																	
	DIMENSIONAL MODELING																	
1	Build Matrix					❍	❍	●	●	❍	■							
2	Choose Data Mart		❍	❍	❍	●	■	◆	◆									
3	Declare Grain					❍	❍	❍	●	■								
4	Choose Dimensions							❍	●	■								
5	Develop Fact Table Diagram							❍	●	■								
6	Document Fact Table Detail							❍	●	■								
7	Design Dimension Detail							❍	●	■								
8	Develop Derived Fact Worksheet	❍			◆	❍	❍	●	❍	■			❍					
9	User Review & Acceptance	❍	❒	❒	❍	●	❍	❍	❍	■								
10	Review DB Design Recommendations for E/U Tool								❍	●	❍		❍			❍		
11	Review DB Design Recommendations for DBMS								❍	●								
12	Complete Logical Database Design								❍	●								
13	Identify Candidate Prestored Aggregates	◆				❍		❍	●	❍								
14	Develop Aggregation Table Design Strategy								❍	●								
15	Review Logical Database Design w/Team						❍	❍	❍	●	❍	■	❍			❍		
16	Certify DB Design with DSS Tool Vendor									●								
17	User Acceptance/Project Review	❍	❒	❒	❍	●	❍	❍	❍	❍	❍	■	❍	■	■	■	■	■
	ANALYZE DATA SOURCES																	
1	Identify Candidate Data Sources							■	❍	❍	●					■		
2	Browse Data Content							■	❍	❍	●					■		
3	Develop Source to Target Data Map								❍	❍	●					●		

4	Estimate Number of Rows					◆	◆	◆	❍	●	❍						
5	User Acceptance/Project Review	❍	❒	❒	❒	●	❍	❍	❍	❍	❍	■	❍	■	■	❍	■	■
	ARCHITECTURE																
	TECHNICAL ARCHITECTURE DESIGN																
1	Create Architecture Task Force					❍	❍							●	❍		
2	Gather & Document Technical Requirements						◆	◆	◆	◆	◆		◆	●	❍		
3	Review Current Technical Environment					◆	❍	❍	❍	❍	❍		❍	●	❍		
4	Create Architecture Plan						◆	◆	◆	◆	◆		◆	●	❍		
5	Determine Phased Implementation Approach					❍	❍							●	❍		
7	Create Infrastructure Plan													●	❍		
8	Develop Configuration Recommendations													●	❍		
9	User Acceptance/Project Review	❒	❒	❒	❒	❍	●	❒	❒	❒	❒	❒	❒	❍	❍	❒	❒	❒
	IMPLEMENT TACTICAL SECURITY MEASURES																
1	Develop Tactical Security Plan					❍	❍							●	❍		
2	Secure Physical Environment						❍							❍	●		
3	Install Virus Checking Software						❍							❍	●		
4	Secure Access into Environment						❍							●	❍		
5	Secure Access out of Environment						❍							●	❍		
6	Implement Rigorous Password Scheme						❍							●	❍		
7	Implement Controls for Software Installation						❍							❍	●		
8	Audit Security Violations					❍	❍							●	❍		
9	Monitor Security Privileges by Individual					❍	●							❍	❍		
10	User Acceptance/Project Review	❒	❒	❒	❒	❍	●	❒	❒	❒	❒	❒	❒	❍	❍	❒	❒	❒
	DEVELOP STRATEGIC SECURITY PLAN																
1	Design Security Architecture						❍							●	❍		
2	Implement Access Tokens (Elim. Passwords)						❍							●	❍		
3	Implement Public/Private Keys for Authentication						❍							●	❍		
4	Implement Secure Tunneling for Remote Access						❍							●	❍		
5	Centralize Authentication & Access Control						❍							●	❍		
6	Impl. Signed Certificates for Software Downloads						❍							●	❍		
7	User Acceptance/Project Review	❒	❒	❒	❒	❍	●	❒	❒	❒	❒	❒	❒	❍	❍	❒	❒	❒
	PRODUCT SELECTION																
	(Repeat for each selection area)																

1	Develop Evaluation Matrix					●	●	❍	❍					●	❍			
2	Research Candidate Products						❍	❍	❍	❍	❍		❍	●	❍			
3	Develop Product Short List						❍	❍	❍	❍	❍		❍	●				
4	Evaluate Product Options	◆				❍	❍	❍	❍	❍	❍		❍	●	❍			
5	Optional Prototype (May repeat for diff. products)																	
	Select Business Process / Data for Evaluation					●	●	❍	❍									
	Define Completion Criteria					●	●							❍				
	Acquire Resources (Internal/Vendor)					❍	●											
	Determine Test Configuration						❍			❍	❍		❍	●	❍			
	Install Evaluation Prerequisites & Components							❍	❍	❍	❍		❍	❍	●			
	Train the Evaluation Team	❍				❍	●	❍	❍	❍	❍	❍	❍	❍	❍			
	Develop & Tune Prototype						❍	❍	●	●	●		●	❍	●			
	Conduct Tests	◆				◆	◆	◆	◆	●	●	◆	●	◆	●			
	Analyze & Document Results	◆				❍	●	◆	◆	◆	◆		◆	●	❍			
6	Determine Product Recommendation	◆	❒	❒	❒	●	●	❍	❍	❍	❍		❍	●	❍			
7	Present Findings / Results To Management		❒	❒	❒	●	●	◆	◆	◆	◆		◆	◆	◆			
8	Negotiate Contract						●											
9	User Acceptance/Project Review	❒	❒	❒	❒	●	❍	❍	❍	❍	❍	❍	❍	❍	❍	■	■	■
	PRODUCT INSTALLATION																	
	(Repeat for each product)																	
1	Installation Planning													●	❍			
2	Meet Prerequisites													❍	●			
3	Install Hardware / Software													❍	●			
4	Test Hardware / Software													❍	●			
5	User Acceptance/Project Review	■	❒	❒	❒	❍	●	❍	❍	❍	❍	■	❍	❍	❍	■	■	■
	IMPLEMENTATION																	
	PHYSICAL DATABASE DESIGN																	
1	Define Standards									●								
2	Design Physical Tables & Columns								◆	●								
3	Estimate Database Size						◆	◆	◆	●	◆							
4	Develop Initial Index Plan							◆	◆	●			◆					
5	Develop Initial Aggregation Plan							❍	❍	●								
6	Develop Initial Partitioning Plan									●								
7	User Acceptance/Project Review		❒	❒	❒	❒	●	❍	❍	❍	❍	■	❍	■	■	❍	■	■

	PHYSICAL DATABASE IMPLEMENTATION																
1	Determine DBMS Fixed Parameters								●								
2	Install DBMS								●				❍	❍			
3	Optimize DBMS Changeable Parameters								●								
4	Build Physical Storage Structure								●								
5	Setup RAID								●				❍	❍			
6	Complete Table and Index Sizing							◆	●								
7	Create Tables and Indexes								●								
8	User Acceptance/Project Review		❒	❒	❒	❒	●	❍	❍	❍	❍	■	❍	■	■	■	■	■
	DATA STAGING DESIGN & DEVELOPMENT																
1	Design High Level Staging Process									●					❍		
2	Develop Detailed Staging Plan by Table									●					❍		
3	Set Up Development Environment								●	❍			❍	❍	❍		
4	Define & Implement Staging Metadata							◆	◆	●					●		
5	Develop 1st Static Dimension Table Process (Extract, Transformation & Load)							◆	◆	❍					●		
6	Develop 1st Dimension Maintenance Process							◆	◆	❍					●		
7	Develop Remaining Dimension Table Processes							◆	◆	❍					●		
8	Develop Fact Table Process (Extract, Transformation & Load)							◆	◆	❍					●		
9	Develop Incremental Fact Table Process							◆	◆	❍					●		
10	Design & Implement Data Cleansing						◆	◆	◆	●					●	❍	❍
11	Design & Develop Aggregation Process					◆	◆	◆	◆	●		◆			●		
12	Automate Entire Process					❍				❍					●		
13	Develop Data Quality Assurance Processes					❍	❍	❍	❍	❍					❍	❍	●
14	Implement DB Administration (Archive, Backup & Recovery)					❍			●	◆					◆		❍
15	User Acceptance/Project Review		❒	❒	❒	❍	●	❍	❍	❍	❍	❍	❍	■	■	❍	❍	❍
	POPULATE & VALIDATE DATABASE																
1	Set Up Production Environment								●				❍	❍			
2	Load Initial Test Data									❍					●		
3	Initial Data Validation/Quality Assurance				❍	❍				❍					❍	❍	●
4	Load Historical Data									❍					●		
5	Perform Data Validation/Quality Assurance				❍	❍				❍					❍	❍	●
6	User Acceptance/Project Review		❒	❒	❍	●	❍	❍	❍	❍	❍	❍	❍	■	■	❍	❍	❍

	PERFORMANCE TUNING																	
1	Set Up Benchmark Queries					❍	❍	❍	❍	●			●	❍	❍			
2	Review Indexing & Aggregation					❍	❍	❍	❍	●			❍					
3	Review Tool Specific Tuning					❍	❍			❍			●					
4	Conduct Ongoing Database Monitoring					❒	❒			●								
5	User Acceptance/Project Review		❒	❒	❒	❍	●	■	■	❍	❍	■	❍	■	■	■	■	■
	END USER (E/U) APPLICATION SPECIFICATION																	
1	Identify & Prioritize Candidate Reports	◆				●	❍	❍	◆				●					
2	Design Template Navigation Approach					◆	❍	◆	◆				●					
3	Develop E/U Application Standards					❍	❍	◆	◆				●					
4	Document Detailed Template Specifications					◆	❍	❍	◆				●					
5	Review End User Application Specs w/Users	❍			❒	●	❍	❍	❍				●					
6	Revise End User Application Specs					◆	❍	◆					●					
7	Revise Project Scope	❒	❒	❒	❍	●	●	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
8	User Acceptance/Project Review	❒	❒	❒	❍	●	❍	❍	❍	❍	❍	■	❍	■	■	❍	❍	■
	END USER (E/U) APPLICATION DEVELOPMENT																	
1	Select Implementation Approach	❍				❍	❍	❍	❍				●					
2	Review Application Specifications	❍				❍	❍	❍	❍				●					
3	Review Application Standards					❍	❍	❍					●					
4	Populate E/U Tool Metadata					◆		◆	◆	◆	◆		●			◆	◆	
5	Develop E/U Applications							❍					●					
6	Provide Data Accuracy & Cleanliness Feedback					❍	❍	❍			❍		❍			❍	❍	●
7	Develop E/U Navigation					◆		❍					●					
8	Review w/Users	❍				❍	❍	❍					●					
9	Document E/U Applications					◆		❍					●					
10	Develop E/U Application Maint. Procedures					❍	❍						●					
11	Develop E/U Application Release Procedures					❍	❍						●					
12	User Acceptance/Project Review	❍	❒	❒	❍	●	❍	❍	❍	❍	❍	❍	❍	■	■	■	■	■
	DEPLOYMENT & GROWTH																	
	DEPLOYMENT PLANNING																	
1	Develop Desktop Infrastructure Checklist						❍						◆	●	◆			
2	Develop Initial User Education Strategy	◆			❒	●	●	❍	❍			●	❍				❍	❍
3	Define User Support Strategy				❒	●	●	❍				❒	❍	❒				
4	Define Release Plan				❍	●	●	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆

5	Review Deployment Strategies & Release Plan	❒	❒	❒	❍	●	◉	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍
6	Develop User Course Materials	◆				◆	◆	◆	◆			●	◆					
7	Develop Support Procedures					●	◉	❍	❍	❍	❍		❍			❍		
8	User Acceptance/Project Review	❒	❒	❒	❒	●	❍	❍	❍	❍	❍	❍	❍	■	■	❍	❍	❍
	COMPLETE SYSTEM TEST																	
1	Run Complete Data Staging Process						❍			●	●					●		
2	Perform Standard QA Procedures					❍	❍			❍	❍		❍			❍	❍	◉
3	Run Core End User Applications					❍	❍	❍					◉					
4	Review Overall Process					●	◉	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍
5	User Acceptance/Project Review	❒	❒	❒	❍	●	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍
	DEPLOYMENT (ALPHA, BETA & PROD'N)																	
1	Assess Deployment Readiness					●	◉											
2	Configure & Test Desktop Infrastructure												❍		●			
3	Set Up Security Privileges						❍			❍			❍	●	❍			
4	Educate Users	❍				❍	❍	❍	■			●	❍					
5	User Acceptance/Project Review	❒	❒	❒	❍	●	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍
	DATA WAREHOUSE MAINTENANCE																	
1	Provide Ongoing User Support	❍				●	◉	❍				❍	❍		❍		❍	❍
2	Provide Ongoing User Education	❍				❍	❍	◆	◆			●	◆				◆	◆
3	Maintain Technical Infrastructure						❍			●				●	●			
4	Monitor End User Query Performance					◆	❍	■		●			◉					
5	Monitor Data Staging Performance						❍			●	●					●		
6	Monitor Ongoing Success	◆	❒	❒	◆	●	◉	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆	◆
7	Communicate Continuously and Market Success	❍	❍	❍	❍	●	◉	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍
8	User Acceptance/Project Review	❒	❒	❒	❍	●	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍
	DATA WAREHOUSE GROWTH																	
1	Establish Data Warehouse Steering Committee		●	●	◉	❍	❍											
2	Establish Enhancement Prioritization Strategy		●	●	◉	❍	❍											
3	Iteratively Use Business Dimensional Lifecycle	❍	❍	❍	❍	●	◉	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍	❍

Kimball, Ralph, et al, The Data Warehouse Lifecycle Toolkit, New York, NY:Wiley, 1998